



Virginia Healthcare Workforce Briefs

Indicators from the Bureau of Labor Statistics'
Current Employment Statistics Survey
Series 2: Regional & Sectoral Employment

Series 2, Issue 67

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Data in this report are not seasonally adjusted. Self-employed persons, including health professionals in private practice, are not included.

Highlights

- ◆ Data in this series are not seasonally adjusted and exhibit short-term volatility from fluctuations in holidays, weekends, weather and other seasonal factors. Estimates for the most recent month are preliminary.
- ◆ Virginia's Health Care & Social Assistance (HC&SA) sector lost 1,400 jobs in September, which represents a one-month annualized employment growth rate of -3.7%.
- ◆ The Rest of Virginia was the only region in the state that created HC&SA jobs in September. This region increased HC&SA employment by 2,400 during the month. However, the other three regions in the state all lost HC&SA jobs in September. Northern Virginia's HC&SA sector lost 1,900 jobs, while Richmond shed 1,600 HC&SA jobs. Meanwhile, Hampton Roads saw HC&SA employment fall by 300 during the month.
- ◆ After creating 300 new jobs in September, Virginia's Ambulatory Health Care Services has now increased employment in each of the past four months. Virginia's Hospitals also experienced a small employment gain in September with the creation of 100 new jobs during the month. However, Virginia's Social Assistance subsector lost 1,100 jobs, while employment in Nursing & Residential Care Facilities declined by 700.

Data in Brief

Not Seasonally Adjusted*	Employment, in Thousands				Growth Rate, Annualized		
	Sept. 2016	June 2017	Aug. 2017	Sept. 2017	12 Month	3 Month	1 Month
Virginia							
Total Nonfarm	3,939.0	4,009.4	3,972.4	3,973.2	0.9%	-3.6%	0.2%
Health Care & Social Assistance	438.6	443.9	447.8	446.4	1.8%	2.3%	-3.7%
Hampton Roads							
Total Nonfarm	776.8	782.6	775.3	767.1	-1.2%	-7.7%	-12.0%
Health Care & Social Assistance	93.9	93.6	94.9	94.6	0.7%	4.3%	-3.7%
Northern Virginia							
Total Nonfarm	1,445.8	1,479.9	1,464.8	1,456.5	0.7%	-6.2%	-6.6%
Health Care & Social Assistance	128.0	132.5	131.9	130.0	1.6%	-7.3%	-16.0%
Richmond							
Total Nonfarm	667.3	683.1	679.7	677.8	1.6%	-3.1%	-3.3%
Health Care & Social Assistance	85.4	86.4	88.7	87.1	2.0%	3.3%	-19.6%
Rest of Virginia							
Total Nonfarm	1,049.1	1,063.8	1,052.6	1,071.8	2.2%	3.0%	24.2%
Health Care & Social Assistance	131.3	131.4	132.3	134.7	2.6%	10.4%	24.1%

Preliminary estimates are italicized

*Seasonally adjusted data are adjusted by the Bureau of Labor Statistics to account for weather and other seasonal changes. Since the US Bureau of Labor Statistics does not provide seasonally adjusted data at this level, this series uses **non**-seasonally adjusted data exclusively. Seasonal variation may account for some of the variation in time series data. When comparing data in this series to other HWDC series or other publications it is important to note whether the data reported have been seasonally adjusted.

Regional HC&SA Employment Growth, Level

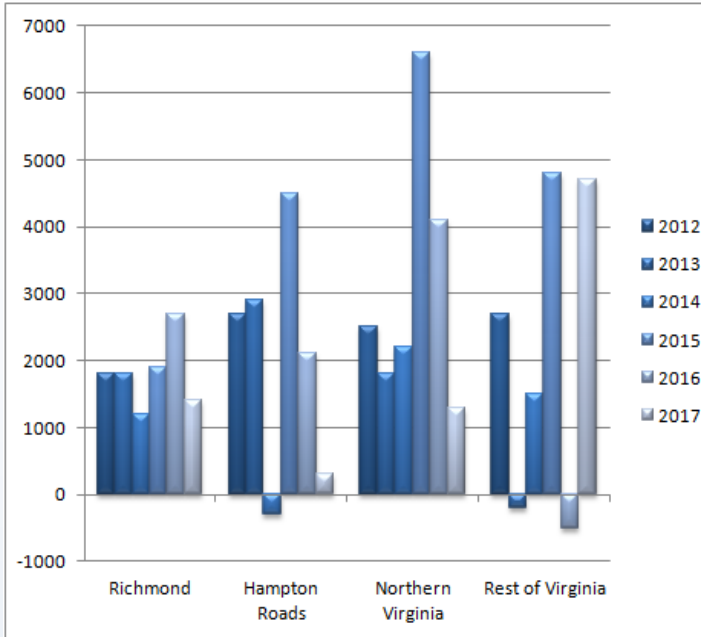
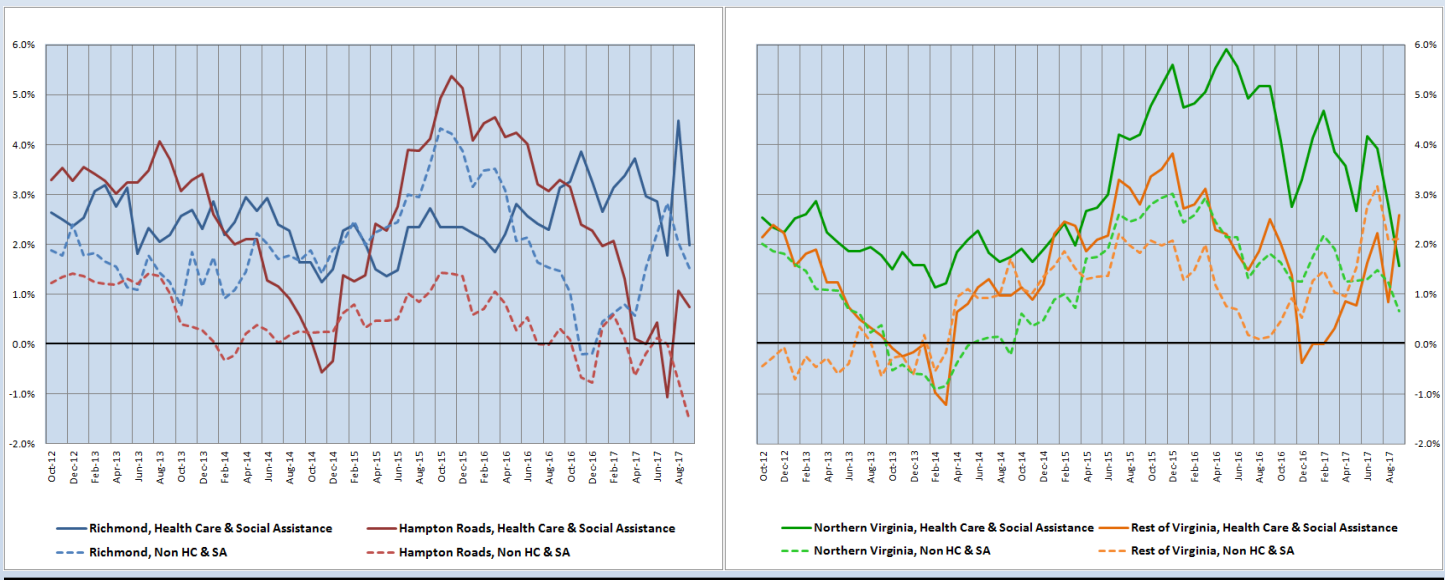


Figure 1: Annual Change in HC&SA Employment (Not Seasonally Adjusted, Full-Year Change for 2012-2016, Jan.-Sept. for 2017).

Year-Over-Year Regional Employment Growth

The Rest of Virginia continued the upward trend in its year-over-year HC&SA employment growth in September. After experiencing a temporary dip to 0.84% in August, this growth rate more than tripled in September to 2.59%, thereby reaching its highest value in a year and a half. At the same time, the year-over-year HC&SA employment growth rate in Richmond fell by more than half from 4.48% to 1.99%. As for Northern Virginia, its year-over-year HC&SA employment growth rate fell for the third consecutive month in September from 2.81% to 1.56%, which represents its lowest value since March 2014. Finally, Hampton Roads saw its year-over-year HC&SA employment growth rate fall from 1.06% to 0.75%.

Figure 2: Year-Over-Year Employment Growth (Not Seasonally Adjusted).



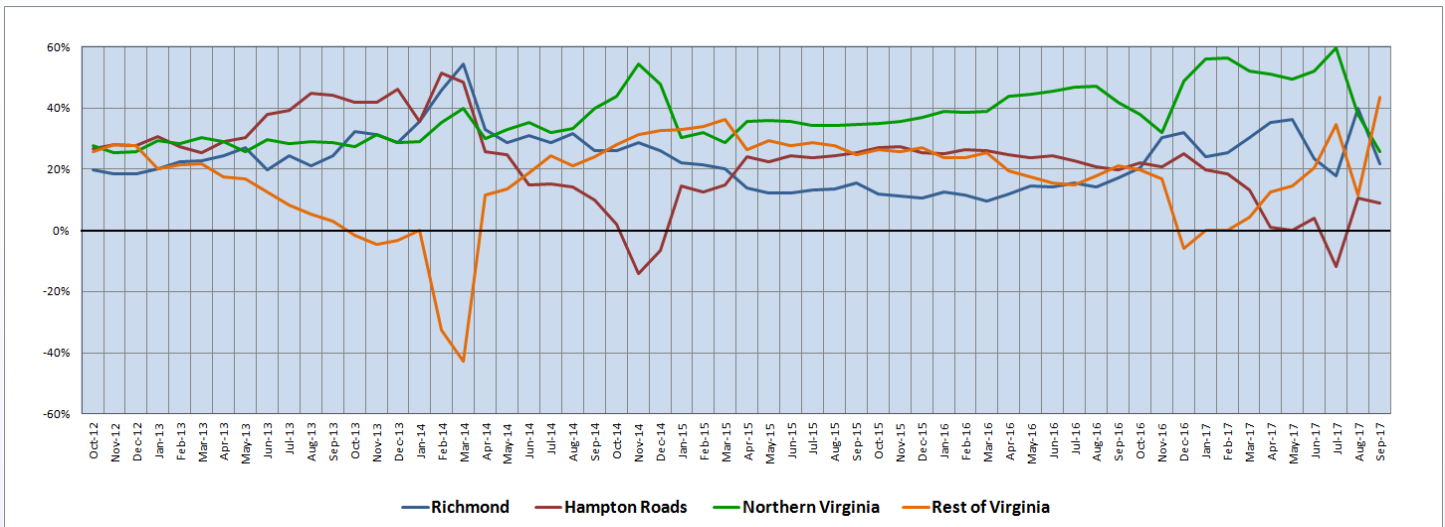
According to preliminary data released on Friday, October 20, 2017, by the U.S. Department of Labor, Bureau of Labor Statistics, Virginia's Health Care & Social Assistance (HC&SA) sector lost 1,400 jobs in September. This decline represents a one-month annualized employment growth rate of -3.7%.

The most job losses came from Northern Virginia's HC&SA sector. In September, this region lost 1,900 HC&SA jobs, which represents a one-month annualized employment growth rate of -16.0%. Employment growth in Northern Virginia's HC&SA sector has weakened considerably in recent months. After creating 1,900 HC&SA jobs in June, this region has shed 2,500 HC&SA over the past three months.

Richmond also experienced a significant decline in HC&SA employment in September after losing 1,600 jobs, while HC&SA employment in Hampton Roads fell by 300 during the month. However, these losses were mitigated somewhat by the gain of 2,400 HC&SA jobs in the Rest of Virginia. In fact, this region has now created 4,700 HC&SA jobs in 2017.

Regional Share of 12-month Growth

Figure 3: Regional Share of Previous 12-Month Employment Growth in Virginia's HC&SA Sector, Not Seasonally Adjusted.



Thanks to its strong HC&SA employment growth in September, the Rest of Virginia's 12-month HC&SA employment growth share increased dramatically from 11.58% to 43.59% during the month. With this increase, the Rest of Virginia has now become the most significant contributor to 12-month HC&SA employment growth in the state for the first time since March 2015. Meanwhile, Northern Virginia, which had been the largest contributor to 12-month HC&SA employment growth for most of 2015 and 2016, experienced its growth share fall in September to 25.64%, thereby reaching a low not seen in nearly five years. As for Richmond, its 12-month HC&SA employment growth share fell from 40.00% to 21.79% in September, Hampton Roads' 12-month HC&SA employment growth share dropped from 10.53% to 8.97%.

Subsector Employment Growth

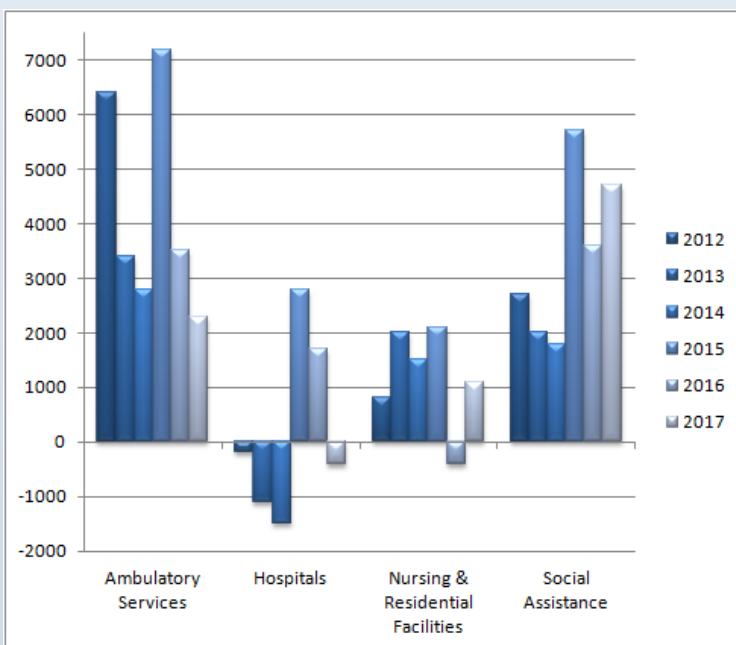


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2012-2016, Jan.-Sept. for 2017).

Despite the overall HC&SA employment losses in the state during the month of September, two of Virginia's four HC&SA subsectors actually created jobs. Ambulatory Health Care Services increased employment for the fourth consecutive month after adding 300 new jobs in September. During this streak, Ambulatory Health Care Services has created 2,700 jobs. Meanwhile, Virginia's Hospitals increased employment by 100 in September, but this gain was not enough to overturn the year-to-date job losses in this subsector. So far in 2017, employment in Virginia's Hospitals has fallen by 400.

Virginia's Social Assistance subsector snapped a four-month streak in positive employment growth after losing 1,100 jobs in September. Regardless, this subsector has enjoyed strong year-to-date employment growth. So far this year, employment in Virginia's Social Assistance subsector has increased by 4,700. As for Nursing & Residential Care Facilities, this subsector lost 700 jobs, thereby erasing all of its employment gains from the previous two months.

Distribution of Growth by Subsector

Not Seasonally Adjusted	Employment, in Thousands				Growth Rate, Annualized		
	Sept. 2016	June 2017	Aug. 2017	Sept. 2017	12 Month	3 Month	1 Month
Virginia							
Health Care & Social Assistance	438.6	443.9	447.8	446.4	1.8%	2.3%	-3.7%
<i>Ambulatory Health Care Services</i>	174.0	175.7	177.2	177.5	2.0%	4.2%	2.1%
<i>Hospitals</i>	105.8	105.5	105.4	105.5	-0.3%	0.0%	1.1%
<i>Nursing & Residential Care Facilities</i>	76.4	76.9	77.6	76.9	0.7%	0.0%	-10.3%
<i>Social Assistance</i>	82.4	85.8	87.6	86.5	5.0%	3.3%	-14.1%
Hampton Roads							
Health Care & Social Assistance	93.9	93.6	94.9	94.6	0.7%	4.3%	-3.7%
<i>Hospitals</i>	22.5	22.5	22.6	22.5	0.0%	0.0%	-5.2%
Northern Virginia							
Health Care & Social Assistance	128.0	132.5	131.9	130.0	1.6%	-7.3%	-16.0%
<i>Ambulatory Health Care Services</i>	59.9	62.9	63.2	62.0	3.5%	-5.6%	-20.5%
<i>Hospitals</i>	24.8	24.8	24.6	24.4	-1.6%	-6.3%	-9.3%

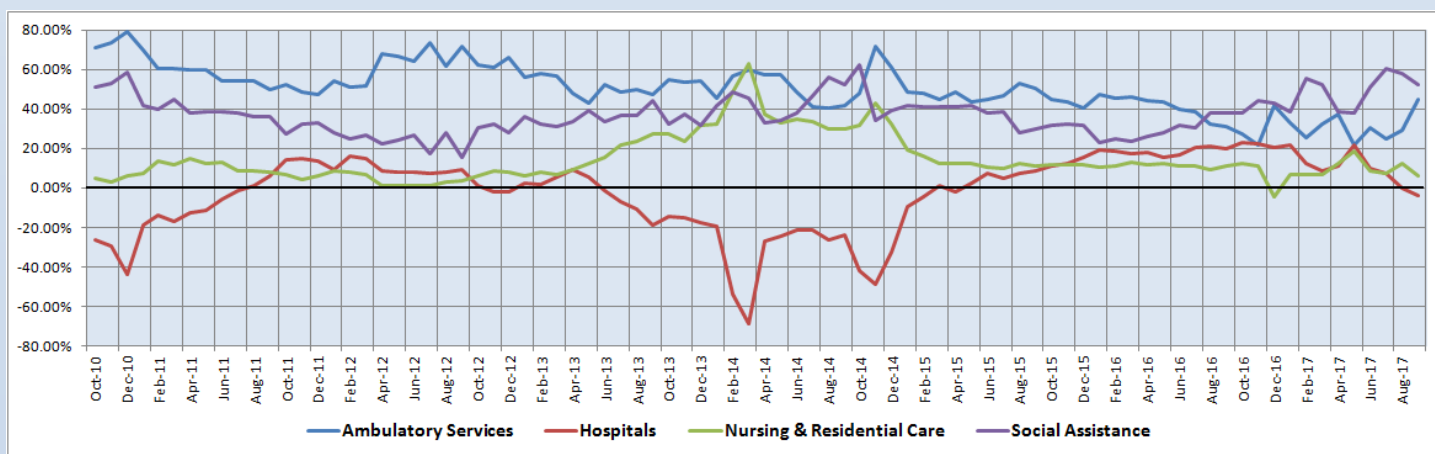
Preliminary estimates are italicized

Virginia's Social Assistance subsector lost 1,100 jobs in September, which represents a one-month annualized employment growth rate of -14.1%. However, Social Assistance still enjoyed strong long-term employment growth. Over the past three months, employment in this subsector has grown at a 3.3% annualized rate, while its 12-month employment growth rate is an even more impressive 5.0%. Ambulatory Health Care Services has also enjoyed relatively strong long-term employment growth. In addition to growing at a 4.2% annualized rate over the past three months, this subsector has grown employment by 2.0% over the past year, which is above the 1.8% statewide average for the HC&SA sector.

Share of 12-Month Growth by Subsector

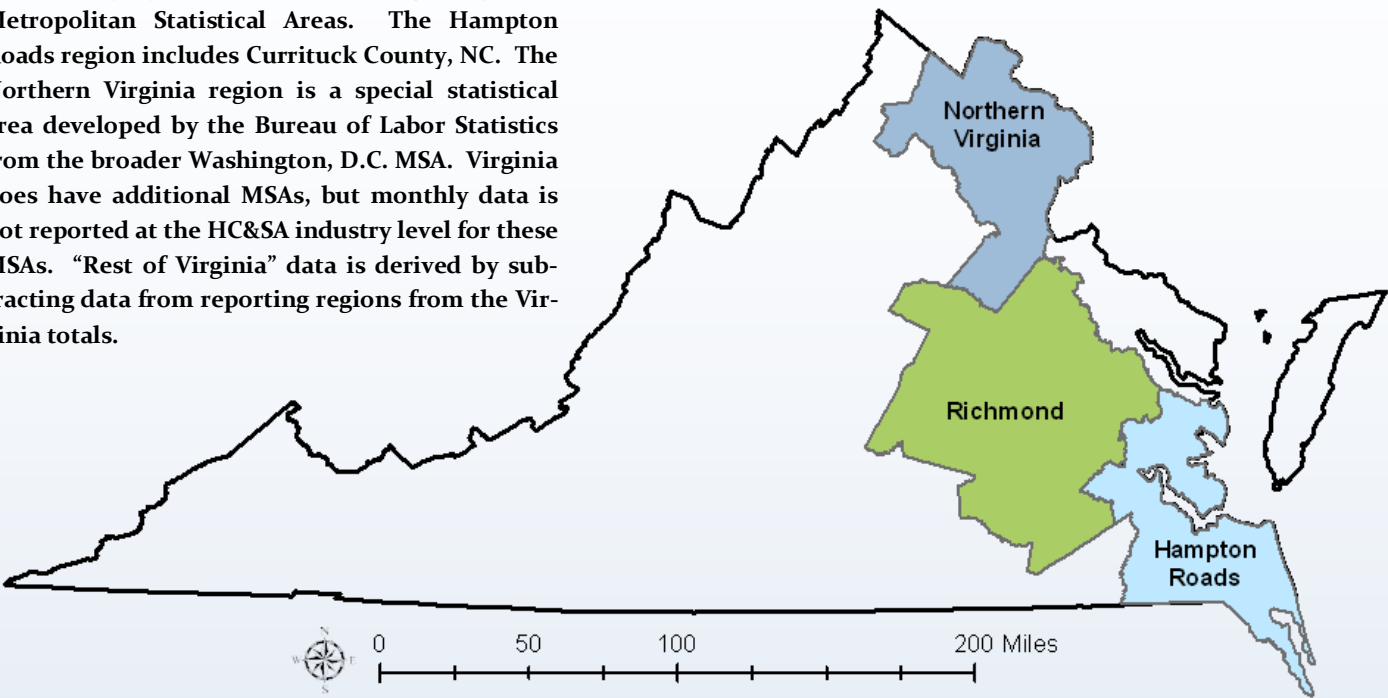
Ambulatory Health Care Services experienced a significant jump in its 12-month HC&SA employment growth share in September from 29.47% to 44.87%. At its current level, the 12-month HC&SA employment growth share of Virginia's Ambulatory Health Care Services has reached a one-and-a-half-year high. Meanwhile, Virginia's Social Assistance subsector saw its 12-month HC&SA employment growth share fall from 57.89% to 52.56% in September. As for Nursing & Residential Care Facilities, this subsector saw its 12-month HC&SA employment growth share cut nearly in half from 12.63% to 6.41%, while Virginia's Hospitals saw its growth share fall for the fourth consecutive month from 0.00% to -3.85%.

Figure 5: Share of Previous 12-Month Growth in Virginia's HC&SA Subsectors (Not Seasonally Adjusted).



Region Map

HWDC *Briefing Series 2* uses Federally designated Metropolitan Statistical Areas. The Hampton Roads region includes Currituck County, NC. The Northern Virginia region is a special statistical area developed by the Bureau of Labor Statistics from the broader Washington, D.C. MSA. Virginia does have additional MSAs, but monthly data is not reported at the HC&SA industry level for these MSAs. “Rest of Virginia” data is derived by subtracting data from reporting regions from the Virginia totals.



Region Detail

Northern Virginia		Richmond		Hampton Roads	
Northern VA, (Non-standard CES Area 94783)		Richmond, VA (MSA 40060)		Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)	
Counties:	Cities	Counties:	Cities	Counties:	Cities
Arlington	Alexandria	Amelia	Colonial Heights	Gloucester	Chesapeake
Clarke	Fairfax	Caroline	Hopewell	Isle of Wight	Hampton
Fairfax	Falls Church	Charles City	Petersburg	James City	Newport News
Fauquier	Fredericksburg	Chesterfield	Richmond	Mathews	Norfolk
Loudoun	Manassas	Cumberland		Surry	Poquoson
Prince William	Manassas Park	Dinwiddie		York	Portsmouth
Spotsylvania		Goochland			Suffolk
Stafford		Hanover			Virginia Beach
Warren		Henrico			Williamsburg
		King & Queen		Currituck, NC	
		King William			
		Louisa			
		New Kent			
		Powhatan			
		Prince George			
		Sussex			

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About the Data

Data in this report are from the US Department of Labor Bureau of Labor Statistics' Current Employment Statistics program. The CES program surveys about 143,000 businesses and government agencies monthly. Unless otherwise noted, this series uses data that are not seasonally adjusted. Seasonal variations related to weather, holidays, weekends, seasons and other predictable variations are apparent in the data. Short-term changes may be related to seasonal changes rather than underlying trends. Data from recent months is preliminary and subject to revision in future releases from the CES. Revisions will be reported in future editions of this series. Unless otherwise noted, the CES data presented in this series:

Includes:

- ◆ Data on employed individuals drawing a paycheck (payroll employees).
- ◆ All employees, regardless of role, occupation or hours worked.
- ◆ HC&SA employees in the private sector only.
- ◆ Persons employed by health professionals in private practice.
- ◆ Both government and private sector workers in nonfarm employment data.

Does not include:

- ◆ Self-employed workers or volunteers, including health professionals in private practice.
- ◆ HC&SA employees in the public sector. (These are counted as government workers in monthly reports).
- ◆ Information on hours worked or the quality of employment.
- ◆ Government workers in HC&SA level data. (Government workers, regardless of occupation and role, are classified as public sector employees).

The Department of Health Professions Healthcare Workforce Data Center works to improve the data collection and measurement of Virginia's healthcare workforce through regular assessment of workforce supply and demand issues among the 80 professions and 350,000 practitioners licensed in Virginia by DHP.

The HWDC collects data on Virginia's licensed health professionals through surveys completed during the online license renewal and application process. Survey results and data may be accessed on our website: www.dhp.virginia.gov/hwdc/.

The HWDC also provides a series of Virginia Healthcare Workforce Briefs based data collected by the US Department of Labor's Bureau of Labor Statistics and the US Department of Commerce' Bureau of Economic Analysis.

Virginia Healthcare Workforce Briefs:

Series 1: State & National Employment (Monthly)

Series 2: Virginia Regional Employment (Monthly)

Series 3: Income & Compensation (Quarterly)